

Appl. No. 09/628,479  
Amd dated September 30, 2004  
Reply to Office Action of September 10, 2004

### AMENDMENTS TO THE CLAIMS

This listing of claims will replace all prior versions, and listings, of claims in the application.

#### **Listing of Claims:**

Claim 1 (Previously Presented): A computer-based method comprising:

- capturing with a server forecast data from a set of contributors according to a multi-level organizational model;
- capturing with the server target data from a set of analysts;
- executing software on the server to perform a reconciliation process to reconcile the target data and the forecast data in accordance with the organizational model by:
  - selecting one or more of the contributors associated with a current level of the organizational model,
  - presenting the target data and the forecast data to the selected contributors,
  - receiving with the server review information from the selected contributors, wherein the review information indicates whether the selected contributors accept or reject the forecast data in view of the captured target data,
  - automatically updating the current level with the server based upon the review information,
  - receiving with the server updated forecast data based on the updated current level when at least one of the selected contributors rejects the forecast data, and
  - repeating the reconciliation process with the server until the current level reaches a pre-defined level of the model and the review information indicates that the selected contributors associated with that pre-defined level accept the forecast data; and
- generating a budget report based on the forecast data.

Claim 2 (Cancelled).

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Claim 3 (Previously Presented): The method of claim 1, wherein capturing forecast data comprises receiving the forecast data from a remote computing device over a packet-based network.

Claim 4 (Previously Presented): The method of claim 3, wherein capturing the forecast data comprises communicating a template and a calculation engine to the remote computing device, wherein the template includes a data cube for storing the target data and the forecast data.

Claim 5 (Original): The method of claim 4, wherein the template and the calculation engine are Active X components capable of receiving data and locally processing data on the computing device.

Claim 6 (Previously Presented): The method of claim 1, wherein the model includes a plurality of hierarchically arranged nodes, and each node corresponds to one or more of the contributors.

Claim 7 (Cancelled).

Claim 8 (Previously Presented): The method of claim 1, wherein generating a budget report comprises generating a budget report based on the forecast data when the current level reaches a highest level of the model.

Claim 9 (Previously Presented): The method of claim 1, wherein updating the current level comprises:

incrementing the current level when all of the selected contributors accept the forecast data; and

decrementing the current level when at least one of the selected contributors rejects the forecast data.

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Claim 10 (Previously Presented): A budgeting system for an organization comprising:

- a database configured to store data defining a set of contributors, a set of analysts, and a multi-level model of an organization, wherein the model has a plurality of hierarchically arranged nodes, each node corresponding to at least one of the contributors; and
- a server coupled to the database,

- wherein the server accesses the data within the database, and is configured to capture forecast data from the contributors and target data from the analysts,

- wherein the server selectively presents the forecast data and the target data to a subset of the contributors associated with a current level of the model, and increments the current level when all of the contributors associated with nodes of the current level accept the forecast data and decrements the current level when at least one of the contributors associated with the nodes of the current level rejects the forecast data, and

- wherein the server generates a budget report based on the forecast data when the current level reaches pre-defined level within the model.

Claim 11 (Previously Presented): The system of claim 10 further comprising:

- a computing device communicatively coupled to the server via a packet-based network; and

- a calculation engine executing in an operating environment provided by the computing device, wherein the calculation engine manipulates a data cube in response to the target data and the forecast data.

Claim 12 (Original): The system of claim 11, wherein the template and the calculation engine are Active X components capable of receiving data and locally processing data on the computing device.

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Claim 13 (Previously Presented): The system of claim 10, wherein the server:

- receives review information from the selected contributors for the current level,
- wherein the review information indicates whether the selected contributors accept or reject the forecast data in view of the target data;
- automatically selectively increments or decrements the current level of the organizational hierarchy based upon the review information; and
- upon decrementing the current level to a lower level, presents an interface to receive revised forecast data from at least one contributor associated with the lower level.

Claim 14 (Cancelled).

Claim 15 (Previously Presented): A computer-based method for generating a budget by executing software on a computer, the method comprising:

- storing a model of an organization, wherein the model has a plurality of nodes hierarchically arranged into a number of levels;
- associating a contributor with each node of the model;
- capturing with a computer forecast data from a contributor associated with a node within a lower level of the model;
- capturing with the computer target data from a set of analysts;
- selectively presenting with the computer the forecast data and the target data to a subset of the contributors for reconciliation based on a current level of the model;
- receiving review information with the computer from the subset of the contributors selected based on the current level;
- updating the current level with the computer according to review information; and
- generating with the computer a budget for the organization based on the forecast data when the forecast data is approved by a contributor associated with a root node within a highest level of the model.

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Claim 16 (Previously Presented): The method of claim 15, wherein updating the current level includes incrementing the current level when the review information indicates an acceptance of the forecast data and decrementing the current level when the review information indicates a rejection of the forecast data.

Claim 17 (Cancelled).

Claim 18 (Original): The method of claim 15, wherein capturing forecast data comprises receiving the forecast data from a remote computing device over a packet-based network.

Claim 19 (Original): The method of claim 18, wherein capturing the forecast data comprises communicating a template and a calculation engine to the computing device, wherein the template includes a data cube for storing the target data and the forecast data.

Claims 20-30 (Cancelled).

Claim 31 (Currently Amended): A system comprising:

- means for storing a definition of a hierarchical model of an organization;
- means for receiving organizational target data and forecast data according to the model, wherein the receiving means includes means for capturing the forecast data from a set of contributors and the organizational target data from a set of analysts;
- means for reconciling the organization target data and forecast data according to the model, wherein the reconciling means selectively presents the forecast data and the target data to a subset of the contributors associated with a current level of the model, and increments the current level when all of the contributors associated with the current level accept the forecast data and decrements the current level when at least one of the contributors associated with the current level rejects the forecast data; and
- means for generating an electronic budget based on the reconciled target data and forecast data.

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Claim 32 (Cancelled).

Claim 33 (Currently Amended): The system of claim 31, wherein the reconciling means includes:

means for receiving review input that indicates whether the contributors associated with the current level reject or accept the forecast data; and

means for propagating the forecast data up and down the organization in accordance with the hierarchical model based on the review input.